

**STATE OF MONTANA**

***MONTANA HISTORICAL SOCIETY***

**EQUAL EMPLOYMENT OPPORTUNITY  
PROGRAM ACTION PLAN**



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## I. PLAN PURPOSE

The purpose of this plan is to implement and maintain an Equal Employment Opportunity (EEO) Program to ensure that the Montana Historical Society does not discriminate in employment, based upon race, color, national origin, age, physical or mental disability, marital status, religion, creed, sex, sexual orientation or political beliefs. The Historical Society has adopted the State of Montana's EEO Policy as the basis of its program plan. That document can be found in Appendix A. This plan is discretionary for agencies that are administratively attached to the Department, and have the authority to hire personnel.

## II. GOALS AND OBJECTIVES

The Historical Society's goal is to make its workforce more closely reflect the labor force in Montana. The Department will make specific good faith efforts to identify the underutilization of women and minorities, and make the necessary changes to remove any existing barriers to their employment. The Historical Society will also work to recruit and retain qualified minorities including Native Americans and individuals with disabilities and at all employment levels.

Underutilization may be caused by barriers to employment. Therefore, the Historical Society's hiring officials will review their recruitment, selection, and promotion process as well as the on-the-job treatment of employees to ensure that women and minorities receive equal opportunity to secure employment and promotion.

## III. UNDERUTILIZATION REVIEW

Appendix B contains a table that summarizes the Historical Society's underutilization of women and minorities by EEO category and job groups within the category. This information comes from the Utilization Analysis Report that compares the Historical Society's workforce to Montana's labor force by each job group. If the Historical Society's workforce in a particular job group is less than the labor force, then the job group will be defined as underutilized.

The Historical Society's hiring officials will strive to determine the cause of underutilization (employment barriers) and take appropriate action to remove those barriers. Employment barriers may be caused by:

**Recruitment**—not attracting qualified women and/or minority applicants in numbers proportionate to their external availability.

**Selection**—rate for women and/or minorities is significantly less than the selection rate for the other remaining applicants.

**Upward Mobility**—not advancing qualified women and minorities.

**On-the-Job Treatment**—job conditions or performance evaluations of its employees having an adverse impact on women and minorities.

## IV. ACTION PLAN

The Historical Society has established the following action plan. The Historical Society's managers/hiring officials will strive to increase women and minority representation for underutilized positions by evaluating their recruitment and selection practices to ensure that women and minorities receive equal opportunity to secure employment. The Historical Society will continue its efforts to recruit and retain qualified individuals with disabilities in all levels of our workforce.

### A. Hiring

Prior to beginning the hiring process, the Human Resource Office will review the Utilization Analysis Report for the job category to determine if the position is attracting qualified women and/or minority applicants in numbers proportionate to their external availability.

If the position is underutilized, the hiring official must provide the Human Resource Office with an EEO Recruitment/Selection Plan that requires a job profile review to make sure the position requirements are job-related and consistent with business necessity and the safe performance of the position. Any hiring requirement that does not meet these criteria will be removed to avoid screening out qualified applicants.

The Historical Society will make reasonable accommodations to applicants with physical and mental limitations unless such an accommodation would create an undue hardship on the Historical Society's ability to conduct business.

### B. Recruitment

The Historical Society's recruitment goal is to increase women and minority representation in underutilized positions by attracting qualified candidates to apply for the underutilized positions. Applicant qualifications will be reviewed to be sure qualified individuals are treated in a nondiscriminatory manner. Vacancy announcements for underutilized positions will include the statement:

*Women (and/or) minorities are under-represented in this position and are encouraged to apply.*

The Historical Society will post all external vacancy announcements on the State of Montana Employment website: <http://mt.gov/statejobs/statejobs.asp>, and will notify department employees of these opportunities through the e-mail system.

The Historical Society will continue to partner with the Montana Job Service Workforce Centers in its recruitment efforts. The Job Service Workforce Centers provide the following services for applicants:

1. Post job openings from the State's Employment website and to the America's Job Bank;

2. Conduct training on how to apply for a state job;
3. Provide application materials to the public;
4. Answer general questions about vacancies and application procedures;
5. Provide proficiency testing;
6. Forward completed applications to the hiring agency; and
7. Provide classes on how to use the computer to perform basic internet job search activities, and complete resumes on-line.

The Historical Society will continue to work with recruitment sources (organizations having effective contact with women, minority groups and persons with disabilities) to improve recruitment efforts.

The Historical Society will encourage the employment of women, minorities, and people with disabilities who are not currently in the workforce, by offering part-time employment, internships, or summer employment when possible.

### **C. Compensation**

The Human Resource Office will annually review the MT Compensation Report, the Personnel Action History Report and the Workforce Analysis (shows gender, race and ethnicity of employees) to determine if a gender, race, or ethnicity disparity exists in employees' pay. If a disparity is identified, division administrators will be notified to take appropriate action and attempt to resolve the disparity.

### **D. Training Programs**

Managers involved in the recruitment and selection process will be trained by a Human Resource Specialist to be sure they understand the Diversity Action Plan, and are committed to its implementation.

### **E. Harassment and Discrimination Prevention**

The Historical Society has adopted the State of Montana's EEO Policy (Appendix A) prohibiting the harassment of, or discrimination against, any employee because of any characteristic protected under civil rights laws. Any person who believes he, she or another person has been subjected to discrimination is encouraged to report the incident or action. The complaint resolution procedure is explained in Appendix C. This complaint resolution procedure may not cover members of a collective bargaining unless it is stipulated in the bargaining agreement.

### **F. Promotion**

The Historical Society will strive to ensure all employees are given equal opportunity for promotion by:

1. Posting promotional opportunities through the State's e-mail system;
2. Assisting employees in identifying promotional opportunities;
3. Offering training and educational programs and opportunities for job mentoring to enhance promotions.

The Human Resource Office will annually review internal promotion data to ensure qualified women and minorities are promoted at rates substantially similar to those of qualified men and non-minority employees. The Historical Society will strive to promote and retain qualified individuals with disabilities in all levels of its workforce.

## **G. Termination**

Exit interviews should be conducted by the manager/supervisor or Human Resource Officer to provide the terminating employee with the opportunity to:

1. Discuss the precise reason(s) for the termination;
2. Voice any concerns the employee may have been reticent to express while employed; and,
3. Provide positive and negative comments and suggestions related to their employment experience.

The Historical Society will annually review the Department's termination data to ensure women, minorities, and employees with disabilities do not leave our Department at rates substantially different from those of men, non-minority employees, and employees without disabilities.

## **V. DUTIES AND RESPONSIBILITIES FOR PROGRAM IMPLEMENTATION**

### **A. Director:**

1. Promote the Historical Society Diversity Action Plan, and hold managers accountable for adhering to it.
2. Evaluate Program Manager's participation through their annual performance evaluations.

### **B. EEO Officer/ADA Coordinator:**

1. Review and update the Diversity Action Plan as necessary.

2. Implement and maintain EEO reporting and recordkeeping systems to measure the effectiveness of Historical Society's Diversity Action Plan, and to determine whether goals and objectives have been attained.
3. Annually review compensation adjustments to determine if gender, race, or ethnicity disparities exist in employees pay.
4. Annually update the Historical Society's Underutilization Report. Send the updated report to Program Managers, along with a comparison of last year's with the current year's figures.
5. Assist managers in identifying what may be causing underutilization (employment barriers) and recommend appropriate action.
6. Keep management informed of the latest developments in the area of EEO.
7. Provide training opportunities for managers and employees in the area of EEO and Recruitment and Selection.
8. Review the Utilization Analysis Report prior to beginning the hiring process.
9. Investigate and attempt to resolve all EEO complaints.
10. Provide training to ensure that managers and supervisors understand their responsibility to take action to prevent the harassment of employees and applicants for employment.

**C. Managers/Supervisors:**

1. Responsible for implementing and adhering to the Historical Society's Diversity Action Plan.
2. Lead by example. Treat all persons in the workplace fairly, and with courtesy, dignity and respect.
3. Ensure the Historical Society's EEO Policy Statement and Complaint Resolution Procedure is posted on employee bulletin boards.
4. Responsible for reviewing the recruitment, selection, and promotion process.

**D. Employees:**

1. Treat all persons in the workplace fairly, and with courtesy, dignity and respect.
2. Inform supervisor, the EEO Officer or the Human Resource Office of any EEO concerns.
3. Follow the Historical Society's EEO Program Action Plan.

## **VI. EEO PROGRAM ACTION PLAN DISTRIBUTION:**

### **A. Internal**

1. Each employee will receive a copy of this plan during new employee orientation.
2. The EEO Policy and Complaint Resolution Procedure posters will be permanently posted and conspicuously displayed in areas available to employees and applicants for employment.
3. The Historical Society's Diversity Action Plan will be posted in our Share Drive.

### **B. External**

1. The Historical Society's Diversity Action Plan will be posted on its web page.



## APPENDIX A STATE OF MONTANA EQUAL EMPLOYMENT OPPORTUNITY (\*)

It is the policy of the State of Montana that state government:

- Is an equal employment opportunity employer;
- Does not discriminate in employment based upon **race, color, national origin, age, physical or mental disability, marital status, religion, creed, sex, sexual orientation or political beliefs**; and
- Implements and maintains an effective equal employment opportunity program that may include a written affirmative action plan.

Employees of the State of Montana have a right to work in an environment free from all forms of discrimination. The State of Montana's prohibition of discrimination includes discrimination in hiring, firing, promotions, compensation, job assignments, and other terms, conditions or privileges of employment. The State of Montana may not retaliate or allow, condone, or encourage others to retaliate against any applicant, employee, or past employee for opposing unlawful discriminatory practices, filing a discrimination complaint and/or testifying or participating in any other manner in a discrimination proceeding.

All employees with access to such information shall maintain the confidentiality of the information to the extent reasonably possible and may not release the information to anyone who does not have the right or need to know.

SEXUAL HARASSMENT	DISABILITIES
<p>The State of Montana prohibits sexual harassment of employees, customers, clients and any other persons. There are two categories of sexual harassment:</p> <p><b>Quid pro quo:</b> Sexual favors are sought in return for job benefits or opportunities. It includes being forced to resign (constructive discharge). <b>Examples:</b> Sexual advances that are unwelcome. The loss or threatened loss of a job for failing to comply with a supervisor's sexual demands. This may include situations that began as mutual attractions, but later ceased to be reciprocal. Employment benefits affected in exchange for sexual favors (may include situations where a third party is treated less favorably because others have agreed to sexual advances).</p> <p><b>Hostile working environment:</b> Unwelcome sexual conduct that unreasonably interferes with an employee's job performance or creates an intimidating, hostile or offensive working environment. The key words are <b>unwelcome, unreasonable, and intimidating, hostile or offensive</b>. <b>Examples:</b> Displaying sexually suggestive objects, pictures, cartoons or posters. Verbal abuse of a sexual nature, sexually oriented jokes, innuendoes, or obscenities. Sexually suggestive letters, notes or invitations.</p>	<p>The State of Montana does not discriminate against any applicant or employee in hiring, firing, promotions, compensation, job assignments and other terms, privileges or conditions of employment due to physical or mental disability.</p> <p>The State of Montana provides reasonable accommodation to an otherwise qualified applicant or employee with a known disability that prevents the individual from participating in the application process, competing in the selection process, performing the essential functions of the job, and enjoying equal benefits and privileges of employment. An accommodation that is not effective, creates an undue hardship on a department, or endangers health or safety is not a reasonable accommodation.</p> <p>Any otherwise qualified applicant for employment or employee with a disability who needs reasonable accommodation shall inform the department personnel officer, his or her immediate supervisor or the department ADA coordinator of the nature of the disability and the accommodation requested. Some communicable diseases, for example, HIV/AIDS, are physical disabilities. The State of</p>

Harassment not involving sexual activity or language is also discriminatory if it is sufficiently patterned or pervasive and directed at employees because of their sex. This is <b>gender-based</b> harassment.	Montana does not discriminate against any applicant for employment or employee based upon communicable disease unless required to do so by the reasonable demands of the position.
<b>OTHER HARASSMENT</b>	<b>MATERNITY</b>
<p>The State of Montana's policy is to provide employees with a work environment free of these forms of harassment. Harassment of employees, clients, customers, and any other persons doing business with state government because of a person's <b><i>race, color, national origin, age, physical or mental disability, marital status, religion, creed, sexual orientation or political beliefs</i></b> is prohibited.</p> <p>Examples of other prohibited harassment include, but are not limited to: Coercion of employees, clients, or customers in the participation or non-participation in religious activities; or ethnic slurs, repeated jokes, innuendoes, or other verbal or physical conduct because of a person's nationality, race, color, age, physical or mental disability, marital status, religion, creed, sexual orientation or political beliefs if these actions create an intimidating, hostile or offensive working environment.</p>	<p>The State of Montana may not discriminate against any applicant or employee in hiring, firing, promotions, compensation, job assignments and other terms, conditions or privileges of employment based upon a temporary disability resulting from pregnancy, childbirth, or related medical conditions.</p> <p>The State of Montana may not terminate any employee due to pregnancy or childbirth. The State of Montana shall grant a request by an employee for a reasonable leave of absence for pregnancy, childbirth or related medical conditions. The State of Montana recognizes six (6) calendar weeks as a reasonable period of recovery from the temporary disability due to childbirth.</p>
<b>EQUAL PAY</b>	<b>RELIGION</b>
The State of Montana may not pay unequal compensation to men and women who perform jobs that require substantially equivalent skill, effort, and responsibility that are performed under similar working conditions. Wage differentials are permitted on factors other than sex, for example, longevity, merit, and applicant or employee qualifications.	The State of Montana shall make reasonable accommodation for religious beliefs or practices. Any otherwise qualified applicant for employment or employee who requires reasonable accommodation may inform his or her immediate supervisor or the department EEO officer of the need for a religious accommodation. An accommodation that creates an undue hardship on a department is not a reasonable accommodation

Note: In addition to the aforementioned prohibitions against discrimination and harassment, the Historical Society will strictly adhere to the new provisions of Title II of the Genetic Information Nondiscrimination Act of 2008 (GINA). Title II of GINA protects applicants and employees from discrimination based on genetic information in hiring, promotion, discharge, pay, fringe benefits, job training, classification, referral, and other aspects of employment. GINA also restricts employers' acquisition of genetic information and strictly limits disclosure of genetic information. Genetic information includes information about genetic tests of applicants, employees, or their family members; the manifestation of diseases or disorders in family members (family medical history); and requests for or receipt of genetic services by applicants, employees, or their family members.

If you are considering reporting a complaint, you can: Use your department's complaint resolution procedure. File a complaint with the Human Rights Bureau, Department of Labor and Industry (PO Box 1728, Helena, MT 59624-1728, phone 1-800-542-0807). Complaints with the Human Rights Bureau will be accepted within 180 days of the act or when first discovered, or an extended 120 days if you are using an internal complaint procedure.

If you are not personally a victim of discrimination, but observe actions against other employees that you believe to be discrimination, you are encouraged to bring it to the attention of your EEO Officer or ADA Coordinator.

**Denise King - ADA/EEO Coordinator**

125 N Roberts  
Helena, MT 59620

**(\*) NOTE: The Montana Historical Society has adopted this EEO Policy.**

**APPENDIX B – UNDERUTILIZATION REPORT as of 4/1/2011**  
**(This report will be updated annually)**

EEO Category	1	Official & Administrators	#	Female	Minority
		Occupational Group			
		Code - 111 - Operations/Prg Mgr	5	OK	OK
		Code - 113 - Admin Serv Mgr	1	OK	OK
EEO Category	2	Professionals			
		Occupational Group			
		Code - 131 - HR Spec/Admin Spec	2	OK	OK
		Code - 132 - Accountant	1	OK	OK
		Code - 151 Data Control Spec	1	OK	OK
		Code - 193 - Historical Spec	9	OK	OK
		Code - 254 - Archivist, Curator, Museum Exhibit Spec, Librarian	15	OK	-1
		Code - 271 - Graphic Designer	1	OK	OK
		Code - 273 - Pub Relations Spec, Editor	5	OK	OK
		Photographer	2	-1	OK
		Code - 411 - Retail Sales SupMgr	1	OK	OK
EEO Category	3	Technicians			
		Occupational Group			
		Code - 151 - Technicians	2	OK	OK
		Code - 254 - Museum Exhibit Tech, Library Tech	2	-1	OK

		Code - 433 - Accounting Tech	1	OK	OK
		Code - 436 - Admin Asst	4	OK	OK
EEO Category	4	Protective Services			
		Occupational Group			
		Code - 339 - Security Guard	5	OK	-1
EEO Category	6	Office/Clerical			
		Occupational Group			
		Code - 421 - Cashier	1	OK	OK
		Code - 436 - Secretary	1	OK	OK
		Code - 439 - Admin Clerk	2	OK	OK
EEO Category	7	Skilled Craft			
		Occupational Group			
		Code - 998 - Carpenter	1	OK	OK
EEO Category	8	Service Maintenance			
		Occupational Code			
		Code - 396 - Tour Guide	7	OK	-1
				Female	Minority
SUMMARY	FOR	MONTANA HISTORICAL SOCIETY		OK	-5

## **APPENDIX C**

### **STATE OF MONTANA**

### **NONDISCRIMINATION-EQUAL EMPLOYMENT OPPORTUNITY**

### **COMPLAINT RESOLUTION PROCEDURE (\*)**

The State of Montana is an equal employment opportunity employer and prohibits discrimination based on race, color, national origin, age, physical or mental disability, marital status, religion, creed, sex, sexual orientation or political beliefs unless based on a bona fide occupational qualification (BFOQ). The State also prohibits discrimination in providing services, activities and programs unless providing a reasonable accommodation or reasonable modification would cause an undue hardship.

The State of Montana is committed to resolving complaints of discrimination in a fair and timely manner. The complaint resolution procedure is a dispute resolution process used when an applicant, client, customer or employee alleges that discrimination has taken place. Management must investigate when reports are received. Complaints concerning disability discrimination are submitted to the agency Americans with Disabilities Act (ADA) Coordinator. All other complaints are submitted to the agency Equal Employment Opportunity (EEO) Officer. This complaint resolution procedure may not cover members of a collective bargaining unit unless it is stipulated in the bargaining agreement.

#### **Complainant's Responsibility:**

Any applicant, client, customer, or employee who believes he or she or another person has been subjected to a discrimination of the equal employment opportunity policy is encouraged to report the incident(s) or action(s) to management as soon as possible after the alleged discrimination occurs. Early reporting is encouraged, because management's ability to investigate and act on reports diminishes with time.

#### **Management's Responsibility:**

1. Any supervisor who receives a report of an alleged discrimination shall immediately notify the agency EEO Officer or ADA Coordinator.
2. Upon receipt of a report alleging discrimination, including sexual harassment, the agency shall take all appropriate steps to prevent the alleged conduct from continuing pending completion of the investigation. The agency will determine the steps to be taken by balancing the rights of the alleged victim, including the severity of the alleged conduct, and the rights of the alleged harasser.
3. The EEO Officer or ADA Coordinator shall initiate an investigation or select another appropriate management representative to initiate the investigation no later than 10 working days after receiving notice of the alleged discrimination. The investigation shall include verification of the report, a recommended course of action, and written documentation of the investigation. The investigator shall submit the results of the investigation to department or agency personnel officer. The factual report shall remain confidential and may not be disseminated except to persons having a need or right to know which outweighs the privacy rights of the persons involved.

4. Within 5 working days of receiving the investigator's factual report, the agency will, in writing, inform the complainant, any employees directly involved, their immediate supervisors, and the EEO Officer or ADA Coordinator of the results of the investigation and the agency's decision.

5. If the investigation establishes that there is insufficient evidence to find that illegal discrimination occurred, the agency will inform all parties involved that no action will be taken. If the investigation establishes that discrimination occurred, the agency will take appropriate action, including, but not limited to, disciplinary measures pursuant to the agency's disciplinary policy, which may include termination. The agency will, in writing, inform the complainant only that an action was taken, not the details of the action.

6. Neither the agency management nor any employee will retaliate against any employee for filing a discrimination complaint or for participating in any way in a complaint procedure.

### **OTHER COMPLAINT FILING OPTION**

(1) An applicant, client, customer, or employee may concurrently file a complaint of unlawful discrimination with the Human Rights Bureau (PO Box 1728, Helena, MT 59624-1728, phone 1-800-542-0807.) The complaint must be filed either:

- a. within 180 days of the alleged incident; or
- b. if the employee initiates action to resolve the alleged discrimination in accordance with this procedure or contract grievance procedure, within 300 days of the alleged incident.

Denise King - ADA/EEO Coordinator  
125 N. Roberts  
Helena, MT 59620

**(\*) NOTE: The Montana Historical Society has adopted this complaint resolution procedure.**